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March 1976

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WORLD COFFEE PRODUCTION ESTIMATE REDUCED

Summary

With the 1975/76 coffee harvest virtually complete around the world, latest available information points to a reduction of about 900,000 bags compared with the third (December) estimate of the Foreign Agricultural Service. Total production is now estimated at 71.6 million bags (132.3 lb.), with exportable production of 52.6 million bags. (Exportable production, as considered in this report, represents total harvested production less domestic consumption in producing countries.)

The production estimate for Western Hemisphere countries has been reduced by just over 1 million bags, as lower estimates for Guatemala, El Salvador, and Mexico were only partially offset by slightly higher estimates for Colombia, the Dominican Republic, Haiti, and Bolivia.

Total coffee production in Africa for 1975/76 is now estimated at 17.7 million bags, nearly 300,000 bags less than in the previous estimates. Major changes were lower estimates for the Malagasy Republic and Ethiopia.

In contrast, Asian production appears to be up by nearly half a million bags, primarily reflecting significantly higher production in Indonesia.

The green coffee market was characterized during much of the quarter by rising prices and concern over the future adequacy of supplies, particularly from certain countries. However, late in February the market stabilized and prices retreated somewhat from their record highs. In early March, prices again showed a rising trend.

Given the production outlook for the next few years, it is quite possible that prices will increase still further in the months ahead unless world consumption falls to a greater extent than now appears likely.

Production

North America. The forecast for 1975/76 coffee production in the countries of North and Central America

and the Caribbean has been reduced by over 1 million bags as the effects of unfavorable weather conditions during last year's blooming period belatedly manifested themselves. In addition, the three countries most affected—Mexico, El Salvador, and Guatemala—all had record crops in 1974/75 and some reduction was to be expected. Nevertheless, overall production in this area, now estimated at 13.3 million bags, makes the 1975/76 crop the second largest on record and indicates the continuing upward trend in production in these countries.

The major reduction occurred in **El Salvador**, which harvested 3.3 million bags in 1974/75 and is expected to produce only 2.1 million bags in 1975/76. Apparently, very dry weather conditions during the flowering period adversely affected blossom set.

Similar reasons are believed responsible for the decline in Guatemalan production from 2.5 million bags in 1974/75 to only 2 million bags for the current harvest.

In contrast, favorable weather conditions on the island shared by **Haiti** and the **Dominican Republic** resulted in coffee production now forecast at new high levels for both countries. The situation remains unchanged in **Costa Rica**, **Honduras**, and **Nicaragua**, with moderately good crops expected in all three countries.

South America. Total coffee production on the South American Continent in the 1975/76 coffee year is now estimated at 34 million bags, up 100,000 bags over the January estimate.

The FAS estimate of 1975/76 production in **Brazil** remains unchanged at 23 million bags. Although it is still somewhat early to estimate the 1976/77 harvest with any degree of accuracy, the IBC in mid-January issued what it termed a "first estimate" of the crop. According to the IBC, the harvest will amount to 8.2 million bags. Meanwhile, in the areas of the States of Parana and Sao Paulo affected by last July's frost, farmers continue to pursue the work of rehabilitation and/or eradication of the

coffee trees. Latest available data indicate that about 400 million coffee trees have been uprooted in Parana and an additional 150 million trees pulled out in western Sao Paulo State. Most of this area has now been planted to soybeans, corn, rice, and beans.

In eastern Sao Paulo and southwestern Minas Gerais, the outlook is for a fairly good crop in 1976/77.

A preliminary estimate by FAS indicates a probable total Brazilian production of 9-10 million bags in 1976/77. Meanwhile, in a number of moves affecting both the domestic and export prices of coffee, the Brazilian Government allowed a 50 percent increase in domestic retail coffee prices; increased the minimum export price from 82 cents per pound in December to 84 cents per pound for January and February, 85 cents per pound for March, 86 cents per pound for April, and 87 cents per pound for May; and raised the support price for coffee from Cr\$700 per 60 kg. bag to Cr\$800 as of April 1, Cr\$850 as of July 1, and Cr\$900 as of October 1. Bank loans are available to the coffee growers on the basis of 80 percent of the support price.

A re-evaluation of the damage to the 1975/76 **Colombian** coffee crop by excessive rains indicates that the damage may have been somewhat overstated earlier. Accordingly, the estimate for 1975/76 has been increased by 100,000 bags.

The situation in **Peru**, **Ecuador**, and **Venezuela** remains unchanged from that presented in the January circular.

Africa. Largely as a result of sharply reduced production in Angola as well as small decreases in some other countries, total coffee production on the African Continent is estimated at only 17.7 million bags for 1975/76, the lowest figure in the past 10 years. However, carryover stocks in certain countries are sufficient to meet any foreseeable demand for African coffee.

Despite recent indications foreshadowing a gradual return to more tranquil conditions, the coffee situation in **Angola** remains uncertain. The FAS estimate for 1975/76 is unchanged at 1.2 million bags. An encouraging sign is that a fair quantity of coffee is being shipped from Angolan ports—probably carryover stocks from previous harvests.

The estimate for the **Ivory Coast** has been left at 4.65 million bags despite reports that harvesting has been adversely affected by a shortage of migrant labor from Upper Volta. It may prove necessary to reduce the estimate at a later date, should these reports be confirmed.

The outlook for the current crop year appears promising in **Ethiopia**, although deliveries to Addis Ababa were running some 3 to 4 weeks later than usual. The delay has been attributed to a combination of a late flowering and some remaining difficulties in processing, transportation, and marketing arising out of the changed political situation. Nevertheless, it is estimated that

exports may reach about 1.2-1.3 million bags in 1975/76, which would be substantially more than in either of the past 2 years.

The 1975/76 coffee crop in **Kenya** is now forecast at 1.25 million bags. However, a larger-than-usual percentage of the crop may fall into the lower grades as a result of 2 successive dry years. Unseasonal rains could trigger an outbreak of Coffee Berry disease, although to mid-February no such occurrence had been reported. In order to encourage farmers to step up production and take advantage of the favorable price outlook, the Government recently lowered the price of fertilizer and the Kenya Planters Cooperative Union has set up an inspection and advisory service to assist smaller coffee farmers.

In **Tanzania**, the Coffee Board announced a 5-year coffee-improvement project to be financed, in large part, by European Community countries. The objective of the program is to improve yields from existing trees through the subsidization of fertilizers, insecticides, and equipment to coffee growers.

Asia. On the basis of recent reports, the estimate of coffee production in **India** from the 1975/76 harvest has been raised slightly to about 1.6 million bags, approximately the same as the revised 1974/75 figure. Export prospects are favorable, primarily because of anticipated shortfalls in shipments to world markets from Brazil in 1976. The reasonably good harvest and the existence of carryover stocks from previous years make it appear likely that Indian exports in 1975/76 may reach a record level of over 1 million bags.

With favorable weather throughout the growing areas, the gradual uptrend in coffee production in **Indonesia** continues. Based on the latest available information, coffee production in 1975/76 will exceed 3 million bags for the first time.

Other Developments

U.S. imports of green coffee in 1975 were up by approximately 1 million bags, compared with those of calendar 1974, to about 20.3 million bags. Approximately half of the increase was accounted for by a build-up in stocks from about 3 million bags on December 31, 1974, to 3.6 million bags on December 31, 1975.

There were some shifts in the relative positions of certain countries or regions as suppliers of coffee to the U.S. market. Brazil increased its export to the United States by 1 million bags in 1975, almost entirely at the expense of Africa. In 1975 Brazil gained 19 percent of the U.S. market, up from 14 percent in 1974, while the African share declined to 34 percent in 1975 from 40 percent in 1974. Shipments to the United States from Angola fell off drastically in 1975 to only 1.2 million bags, approximately half the amount exported to this country in 1974. Complete details will be found in the tables.

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GREEN COFFEE: U.S. IMPORTS, BY COUNTRY OF ORIGIN, 1971-75

(In bags of 132.276 lb each)

Continent and Country	1971	1972	1973	1974	1975
North America:					
Costa Rica	350,316	293,505	284,951	268,181	191,892
Dominican Republic	329,125	400,635	508,241	380,664	336,295
El Salvador	622,562	391,242	1,047,283	1,111,021	1,018,441
Guatemala	795,293	698,609	1,111,003	1,096,322	874,416
Haiti	136,694	139,230	110,127	114,138	81,164
Honduras	194,060	163,958	254,685	178,541	400,550
Mexico	1,169,606	1,069,622	1,641,246	1,323,877	1,661,937
Nicaragua	182,213	111,202	146,976	65,931	70,868
Panama	10,403	5,704	7,934	0	30,223
Trinidad and Tobago	45,036	20,836	23,880	3,473	22,532
Other	198	134	675	141,156	6,899
Total North America	3,835,506	3,294,677	5,137,001	4,683,304	4,695,217
South America:					
Brazil	5,991,052	6,152,132	4,626,691	2,725,379	3,747,843
Colombia	2,639,169	2,710,953	2,878,420	3,089,719	3,400,400
Ecuador	404,317	490,282	435,709	511,568	693,607
Peru	437,872	509,106	476,386	286,026	530,452
Venezuela	245,681	242,769	174,163	245,745	182,117
Other	10,989	98,109	31,550	12,120	37,628
Total South America	9,729,080	10,203,351	8,622,919	6,870,557	8,592,047
Africa:					
Angola	1,557,207	1,297,428	1,695,502	2,395,942	1,202,066
Burundi	222,240	309,135	226,097	97,546	271,925
Cameroon	338,279	357,921	364,274	248,465	160,881
Ethiopia	1,127,954	965,009	1,061,506	505,439	532,683
Ivory Coast	1,134,561	976,909	1,150,074	748,635	965,543
Kenya	136,127	146,332	118,322	183,563	231,798
Malagasy Republic	436,126	294,930	322,442	368,574	318,570
Rwanda	161,220	207,359	144,995	285,277	344,117
Tanzania	217,269	236,345	247,389	163,022	276,560
Uganda	820,130	898,638	938,082	939,672	958,362
Zaire (Congo, Kinshasa) ...	390,663	218,010	307,625	313,050	297,584
Other	206,767	217,400	264,464	126,388	137,343
Total Africa	6,748,543	6,125,416	6,840,772	6,375,573	5,697,432
Asia and Oceania:					
India	119,084	105,920	241,052	106,931	257,536
Indonesia	891,402	743,458	627,736	941,517	764,884
Other	318,474	236,520	299,424	230,766	211,004
Total Asia and Oceania	1,328,960	1,085,898	1,168,212	1,279,214	1,233,424
Other countries	4,129	47,400	84,618	36,841	70,387
Grand Total	21,646,218	20,756,742	21,853,522	19,245,489	20,288,507

IV Preliminary.

Compiled from U.S. Bureau of Census data.

GREEN COFFEE: U.S. GROSS IMPORTS FOR CONSUMPTION BY MONTHS, 1971-75

(In bags of 132.276 lb each)

Calendar year	1971	1972	1973	1974	1975
January	2,001,664	2,547,359	1,996,285	2,182,348	1,851,613
February	1,530,384	2,172,388	1,844,698	2,021,633	1,656,028
March	1,479,955	1,137,258	2,100,438	2,457,448	1,534,871
April	2,031,987	1,146,043	2,049,536	2,264,222	1,448,487
May	1,760,254	1,783,520	2,494,016	1,870,680	1,365,017
June	1,939,453	1,452,121	1,714,696	1,528,705	1,735,631
January-June	10,743,697	10,238,689	12,199,669	12,325,036	9,591,647
July	2,131,707	1,434,110	1,572,749	1,499,043	1,625,743
August	2,719,345	1,946,966	1,731,386	1,152,052	1,867,525
September	2,737,661	2,148,989	1,403,295	820,716	2,533,330
October	620,868	2,056,863	1,628,443	739,702	1,783,726
November	874,923	1,642,774	1,637,462	1,159,285	1,587,478
December	1,818,017	1,288,351	1,680,518	1,549,655	1,299,058
July-December ...	10,902,521	10,518,053	9,653,853	6,920,453	10,696,860
Calendar year total	21,646,218	20,756,742	21,853,522	19,245,489	20,288,507
Fiscal year total <u>2/</u>	19,952,156	21,141,210	22,717,722	21,978,889	16,512,100
100 year <u>3/</u>	23,025,162	19,082,562	21,895,087	20,743,279	19,066,887

1/ Preliminary.

2/ Year ending June 30 of year shown.

3/ Year ending September 30 of year shown; 100 is International Coffee Organization.

Compiled from U.S. Bureau of Census data.

GREEN COFFEE: U.S. GROSS IMPORTS BY COUNTRY OR AREA OF ORIGIN,
AVERAGE 1966-70, Annual 1973-75.

Area of origin	Average		1972		1973		1974		1975	
	Mil. bags	Per-cent	Mil. bags	Per-cent	Mil. bags	Per-cent	Mil. bags	Per-cent	Mil. bags	Per-cent
Brazil	6.32	29	6.15	50	4.82	21	2.77	14	3.25	19
Africa and Asia	7.74	36	7.21	35	8.01	37	7.65	40	6.93	34
Europe	3	--	.05	--	.08	--	.02	--	.07	--
Mild coffees:										
Colombia	2.76	13	2.71	13	2.88	13	3.09	16	5.40	17
Other South America	1.25	6	1.54	6	1.11	5	1.05	6	1.44	7
Mexico and Central America ..	3.24	14	2.73	13	4.50	21	4.04	31	4.25	21
Caribbean43	2	.56	3	.64	3	.64	3	.45	2
Total Milds	7.68	35	7.34	35	9.13	42	8.82	46	9.54	47
Total World	21.74	100	20.75	100	21.85	100	19.24	100	20.29	100

1/ Preliminary. 2/ 132.276 lb. or 60 kg. 3/ Less than 10,000 bags.

Compiled from U.S. Bureau of Census data.

COFFEE, GREEN: TOTAL PRODUCTION IN SELECTED COUNTRIES - AVERAGE 1960-67-1971-71, AND 1972-72, 1973-74, 1974-75, 1975-76
(IN THOUSANDS OF 100 KG.)

REGION AND COUNTRY	AVERAGE 1960-67	1971-71	1972-72	1973-74	1974-75	1975-76
NORTH AMERICA						
COSTA RICA.....	1,295	1,35	1,335	1,570	1,391	1,155
CUBA.....	475	41	475	50	45	400
DOMINICAN REPUBLIC.....	504	719	755	445	431	485
EL SALVADOR.....	2,186	2,10	2,101	2,375	2,300	2,110
GUATEMALA.....	3	1	1	1	1	1
HAITI.....	1,770	2,181	2,25	2,21	2,500	2,001
HONDURAS.....	402	525	525	558	521	508
JAMAICA.....	478	41	41	775	801	45
MARTINIQUE.....	19	22	22	31	21	31
MEXICO.....	3	1	1	1	1	1
NICARAGUA.....	2,435	2,101	2,101	2,101	2,412	1,41
PANAMA.....	457	11	471	11	50	500
TRINIDAD-TOBAGO.....	21	1	1	71	7	75
US-MAHAIL.....	61	1	41	31	21	24
US-PUERTO RICO.....	35	22	22	11	11	11
TOTAL.....	11,242	12,101	12,433	13,111	14,741	13,307
SOUTH AMERICA						
BOLIVIA.....	124	1	1	41	4	11
BRAZIL.....	7,601	7,601	7,601	7,601	7,600	7,600
COLOMBIA.....	7,95	7,95	7,95	7,95	7,95	7,95
ECUADOR.....	1,22	1,22	1,22	1,22	1,175	1,175
GUAYANA.....	17	17	17	17	17	17
PARAGUAY.....	43	43	43	43	43	43
PERU.....	904	904	904	904	904	904
SURINAM.....	6	6	6	6	6	6
VENEZUELA.....	227	227	227	227	227	227
TOTAL.....	18,545	18,545	18,545	18,545	18,545	18,545
AFRICA						
ANGOLA.....	5,001	5,001	5,001	5,001	5,001	5,001
BURUNDI.....	244	244	244	244	244	244
CAMEROON.....	1,110	1,110	1,110	1,110	1,110	1,110
CAPE VERDE ISLANDS.....	2	2	2	2	2	2
CENT AFRICAN REP.....	157	157	157	157	157	157
COMORU ISLANDS.....	3	3	3	3	3	3
CONGO, BRAZZAVILLE.....	15	15	15	15	15	15
DAHOMEY.....	17	17	17	17	17	17
EQUATORIAL GUINEA.....	124	124	124	124	124	124
ETHIOPIA.....	1,929	2,115	2,100	2,111	2,115	2,115
GABON.....	17	17	17	17	17	17
GHANA.....	85	85	85	85	85	85
GUINEA.....	164	164	164	164	164	164
IVORY COAST.....	3,740	4,475	5,851	7,265	4,500	4,500
KENYA.....	857	1,001	1,265	1,100	1,100	1,250
LIBERIA.....	70	70	70	70	70	70
MALAGASY REPUBLIC.....	499	965	1,000	1,000	1,185	1,000
NIGERIA.....	56	7	70	34	41	50
RWANDA.....	187	26	186	266	26	260
SAO TOME-PRINCIPE.....	5	5	5	5	5	5
SIERRA LEONE.....	91	95	135	67	11	111
TANZANIA.....	881	55	400	701	834	800
TOGO.....	193	201	200	181	200	195
UGANDA.....	2,967	2,85	3,300	3,100	3,000	2,800
ZAIRE (CONGO-K).....	1,070	1,31	1,380	1,150	1,125	1,015
TOTAL.....	18,316	19,449	21,415	19,183	20,118	17,709
ASIA						
INDIA.....	1,359	1,201	1,581	1,535	1,530	1,625
INDONESIA.....	2,110	2,251	2,700	2,750	2,675	3,100
MALAYSIA.....	106	63	65	67	70	71
PHILIPPINES.....	746	835	850	865	900	901
PORTUGUESE TIMOR.....	50	65	65	65	74	75
VIETNAM SOUTH.....	53	51	55	55	6	51
YEMEN.....	60	45	45	25	35	35
TOTAL.....	4,513	4,513	5,360	5,357	5,445	5,915
OCEANIA						
NEW CALEDONIA.....	30	25	25	45	25	25
PAPUA NEW GUINEA.....	338	48	561	584	617	625
NEW HEBRIDES.....	3	3	2	2	2	2
TOTAL.....	372	507	587	615	644	652
WORLD TOTAL.....	62,981	71,434	76,485	72,944	77,438	71,621

1/ Coffee marketing year begins about July in some countries and in others about October. 2/ Of 100 kilograms each. 3/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1975 in that country is shown as production for the 1975/76 marketing year. In Ecuador, however, this is referred to as the 1974/75 crop.

NOTE: Production estimates for some countries include cross-border movements.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

REGION AND COUNTRY	AVERAGE	1974/75	1975/76	1976/77	1977/78	1978/79
AMERICAN COUNTRIES						
COSTA RICA.....	1,150	1,140	1,100	1,400	1,210	1,203
CUBA.....	54	42	2	5	---	---
DOMINICAN REPUBLIC.....	425	49	49	60	577	489
EL SALVADOR.....	2,041	2,44	1,935	2,213	3,12	1,914
GUATEMALA.....	1,536	1,445	1,390	1,924	2,217	1,710
HAITI.....	303	37	325	34	315	415
HONDURAS.....	379	57	720	835	551	698
JAMAICA.....	6	---	5	14	4	14
MARTINIQUE.....	---	---	---	---	---	---
MEXICO.....	1,501	1,430	2,100	1,590	2,136	2,056
NICARAGUA.....	494	615	480	696	768	595
PANAMA.....	17	23	20	---	---	---
PARAGUAY.....	48	27	40	13	45	41
PERU.....	11	---	2	---	---	---
PUERTO RICO.....	3	---	---	---	---	---
TOTAL.....	7,956	9,450	9,780	9,366	10,887	9,405
CARIBBEAN COUNTRIES						
ARUBA.....	52	6	60	73	64	78
BRAZIL.....	2,299	1,405	1,500	4,370	19,500	15,000
COLOMBIA.....	5,614	5,75	7,430	6,250	7,400	6,450
ECUADOR.....	416	57	840	625	1,018	608
GUYANA.....	1	---	---	---	---	---
PARAGUAY.....	24	4	35	25	19	17
PERU.....	694	60	800	780	64	634
SURINAM.....	2	1	1	1	1	1
VENEZUELA.....	235	30	430	255	35	315
TOTAL.....	17,742	22,684	24,621	14,352	24,681	23,153
AFRICAN COUNTRIES						
ANGOLA.....	3,214	3,3	3,400	3,995	2,895	1,140
BURUNDI.....	279	395	35	445	445	200
CAMEROON.....	1,091	1,220	1,410	1,473	1,688	1,472
CAPE VERDE ISLANDS.....	1	---	---	---	---	---
CENT AFRICAN REP.....	161	165	170	179	164	154
COMORO ISLANDS.....	1	---	---	---	---	---
CONGO, BRAZZAVILLE.....	14	13	13	4	---	4
DAHOMEY.....	15	14	14	12	13	13
EQUATORIAL GUINEA.....	119	118	110	100	105	85
ETHIOPIA.....	1,402	1,490	1,410	1,005	1,340	1,375
GAHON.....	15	5	14	8	4	8
GHANA.....	76	67	67	31	36	45
GUINEA.....	154	95	120	100	94	84
IVORY COAST.....	3,685	4,400	4,985	3,219	4,432	4,580
KENYA.....	839	973	1,240	1,073	1,072	1,221
LIBERIA.....	67	65	80	60	59	64
MALAGASY REPUBLIC.....	444	345	465	605	1,145	853
NIGERIA.....	44	5	40	11	12	22
RWANDA.....	192	254	180	260	25	254
SAO TOME PRINCIPLE.....	3	1	1	---	---	---
SIERRA LEONE.....	43	9	130	62	115	95
TANZANIA.....	655	43	74	674	11	774
TUGO.....	189	197	197	177	197	192
UGANDA.....	2,952	2,831	3,280	3,078	2,978	2,778
ZAMBIA (COPPERBELT).....	925	1,200	1,265	1,040	1,015	900
TOTAL.....	17,300	18,604	21,122	14,880	18,789	16,393
ASIAN COUNTRIES						
INDIA.....	634	435	420	730	51	785
INDONESIA.....	1,518	1,320	1,650	1,795	1,700	2,105
MALAYSIA.....	---	---	---	---	---	---
PHILIPPINES.....	4	---	---	---	---	2
PORTUGUESE TIMOR.....	44	5	4	51	64	64
VIETNAM SOUTH.....	2/	3/	3/	3/	3/	3/
YEMEN.....	50	32	35	21	31	30
TOTAL.....	2,250	1,805	2,565	2,995	2,034	2,906
OCEANIAN COUNTRIES						
NEW CALEDONIA.....	21	10	10	14	14	14
PAPUA NEW GUINEA.....	325	474	450	584	613	620
NEW HEBRIDES.....	3	1	1	1	1	1
TOTAL.....	349	49	57	599	628	635
GRAND TOTAL.....	45,604	53,833	57,166	43,792	51,589	52,572

1. Coffee marketing year begins about July in some countries and in others about October. Exportable production represents total harvested production minus estimated domestic consumption. 2/ 0/ Negligible. 3/ Negligible. 4/ As indicated in footnote 1, the coffee marketing year begins in some countries as early as July. Ecuador is one of these countries. Hence, the crop harvested principally during June-October 1975 in that country is referred to as the 1975/76 marketing year. In Ecuador, however, this is referred to as the 1974/75 crop.

Source: Production estimates for some countries include cross-border movements.

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